



FDMS ADMIN 1.1 Release Notes

Release Date: July 28, 2016

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Release Summary

The FDMS Admin 1.1 Release is the second release of the new FDMS Admin Module. This release focuses on implementing Access Requests, Lockouts, Reports and Secondary User Accounts functionalities. FDMS 3 remains available for Agency Administrators and Records Managers until **September 30, 2016**. After September 30, 2016, agencies must contact the Help Desk to complete any actions not available in the FDMS Admin Module or FDMS 4. The primary features included in this release are:

- Access Requests
- Lockouts
- Reports
- Secondary User Accounts
- Footer added throughout the site

Access Requests

Logging into the application defaults Agency Administrators to the *Access Requests* screen. The screen displays a table similar to existing screens in the application which can be sorted by column using the *sort* arrows and searched using the *Search* box. By default, the *Access Requests* screen is sorted by *Requestor, Ascending*. The screen includes columns with the contact information for the Requestor, the access level requested, and the date they requested the new account.

Figure 1 - Access Requests Screen Default upon Login

The screenshot shows the 'Access Requests' screen in the 'fdms.gov admin' interface. The top navigation bar includes the logo, 'AGENCY ADMIN, ERULEDEMO', 'ERULEDEMO', and 'Logout'. A left sidebar contains links for 'Access Requests', 'Lockouts', 'Users', 'Groups', and 'Reports'. The main content area is titled 'Access Requests' with a notification icon. Below the title is a search bar with a 'Search' button. A table displays the following data:

Requestor ▲ ▼	Email ▲ ▼	Telephone ▲ ▼	Role ▲ ▼	Date Requested ▲ ▼
Jane Doe	noname@noname.net	000-000-0000	Docket Manager	06/23/2016

Below the table, it indicates 'Sorted By: Requestor, Ascending' and '1 - 1 of 1 Access Requests'. The footer contains links for 'About Us', 'Privacy & Security Notice', 'Accessibility', 'Contact Us', and 'Regulations.gov'.

Figure 2 - Access Requests Sort Arrows and Default Sort By

This screenshot is identical to Figure 1 but includes two red arrows pointing to the sort arrows in the table headers. One arrow points to the 'Requestor' header, and the other points to the 'Sorted By: Requestor, Ascending' text below the table. The table data and other interface elements remain the same as in Figure 1.

Figure 3 - Access Requests Search Box

The screenshot shows the 'Access Requests' page in the fdms.gov admin interface. The page has a sidebar with links to 'Access Requests', 'Lockouts', 'Users', 'Groups', and 'Reports'. The main content area is titled 'Access Requests 1'. It features a search bar with a 'Search' button. Below the search bar is a table with columns: 'Requestor', 'Email', 'Telephone', 'Role', and 'Date Requested'. The table contains one entry for 'Jane Doe' with email 'noname@noname.net' and role 'Docket Manager'. The table is sorted by 'Requestor, Ascending' and shows '1 - 1 of 1 Access Requests'. A red arrow points to the search input field.

Requestor ▲ ▼	Email ▲ ▼	Telephone ▲ ▼	Role ▲ ▼	Date Requested ▲ ▼
Jane Doe	noname@noname.net	000-000-0000	Docket Manager	06/23/2016

Sorted By: Requestor, Ascending 1 - 1 of 1 Access Requests

Clicking on the *Requestor* changes the display to the *User Information* screen where the Agency Administrator can review and update the User Information including the *Access Level*. The Agency Administrator can *Approve* or *Deny* the new account from this screen. Either option will send the *Requestor* an email. If the account is approved, the email contains a link to activate the account. If the account is denied, the email informs the user of the denial.

Figure 4 - Access Request User Information

The screenshot shows the 'Access Request: Jane Doe' page in the fdms.gov admin interface. The page has a sidebar with links to 'Access Requests', 'Lockouts', 'Users', 'Groups', and 'Reports'. The main content area is titled 'Access Request: Jane Doe'. It features a 'User Information' section with fields for 'User ID', 'First Name', 'Middle Name', 'Last Name', 'Telephone', 'First Name', 'Last Name', 'Title', 'Telephone', and 'Email'. The 'Access Level' section has radio buttons for 'Docket Manager', 'Docket Staff', 'Rule Writer', and 'Viewer'. The 'Docket Manager' option is selected. At the bottom right, there are 'Approve', 'Deny', and 'Cancel' buttons. A red asterisk denotes a required field.

Access Request: Jane Doe

User Information

User ID: eruledemorequestor1

First Name: Jane

Middle Name:

Last Name: Doe

Telephone: 000-000-0000

First Name: John

Last Name: Smith

Title:

Telephone: 000-000-0000

Email: noname@noname.net

Access Level

Access Level: ☒ Docket Manager ☐ Docket Staff ☐ Rule Writer ☐ Viewer

Approve Deny Cancel

Lockouts

The *Lockouts* screen displays a list of Agency users that are locked out of the system due to one of the following reasons:

- **Locked (Unused)** - Accounts are locked after 30 days of non-use. Resetting unlocks the account so the user can login again.
- **Locked (Invalid Logins)** - Accounts are temporarily locked for 30 minutes after 5 invalid login attempts. Resetting sends the user an email with one-time login credentials.
- **PW Expired** - Passwords expire if a user does not change it within 60 days. Resetting sends the user an email with one-time login credentials.

Agency Administrators can sort and search this screen in the same manner as described in the *Access Requests* section above.

Figure 5 - Lockouts Screen

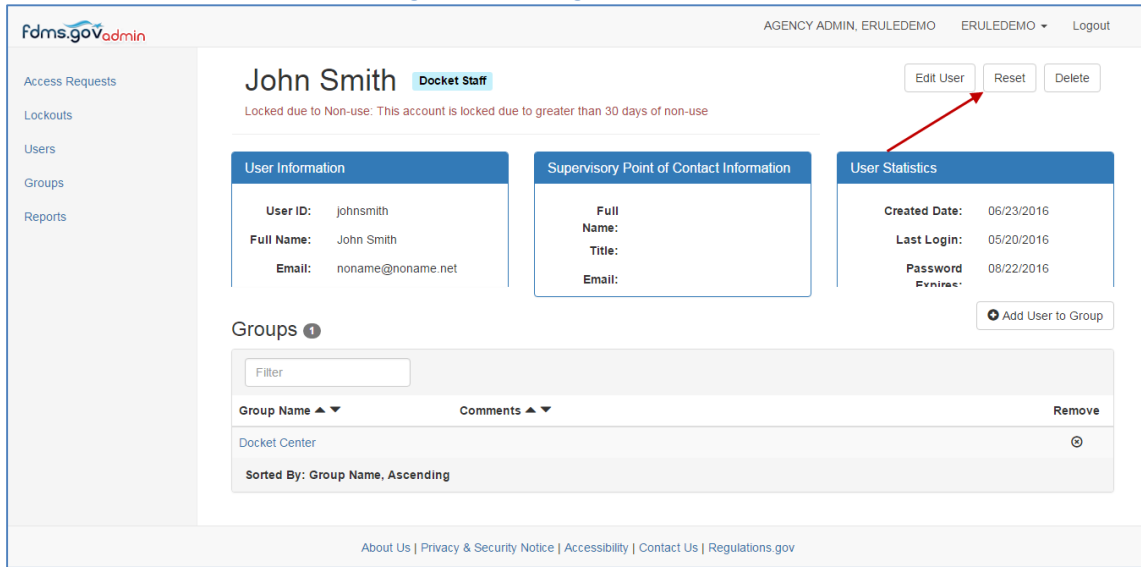
The screenshot displays the 'Lockouts' screen in the Fdms.gov admin interface. The page title is 'Lockouts' with a help icon. Below the title, there are three explanatory paragraphs: 'Locked (Unused)' (accounts locked after 30 days of non-use), 'Locked (Invalid Logins)' (accounts temporarily locked for 30 minutes after 5 invalid attempts), and 'PW Expired' (passwords expire if not changed within 60 days). A search bar is located above a table of locked users. The table has columns: User ID, Last Name, First Name, Middle Name, Role, Status, Last Login, and PW Last Changed. Two users are listed: John Smith (Docket Staff) and Sally Adams (Docket Manager), both with a status of 'Locked(Unused)'. The page also shows a sidebar with navigation links (Access Requests, Lockouts, Users, Groups, Reports) and a footer with legal notices.

User ID	Last Name	First Name	Middle Name	Role	Status	Last Login	PW Last Changed
johnsmith	Smith	John		Docket Staff	Locked(Unused)	05/20/2016	06/23/2016
sallyadams	Adams	Sally		Docket Manager	Locked(Unused)	05/20/2016	06/23/2016

Sorted By: User ID, Ascending 1 - 2 of 2 Users

An Agency Administrator can *Reset* an account that is locked out for any user role in the system; including other Agency Administrators. The *Reset* button is located on the *User Information* screen. Initiating a *Reset* sends the user an email with a link to change their password or reactivate their account.

Figure 6 - Resetting a Locked Account

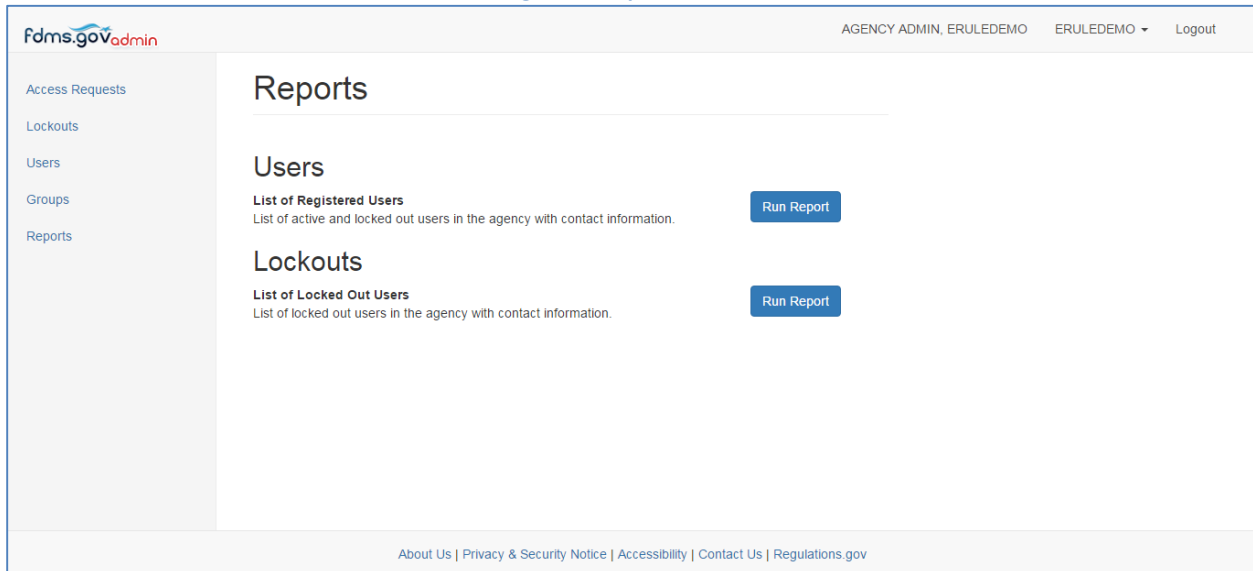


Reports

There are two *Reports* currently available in the Admin Module:

- **List of Registered Users**
List of active and locked out users in the agency with contact information.
- **List of Locked Out Users**
List of locked out users in the agency with contact information.

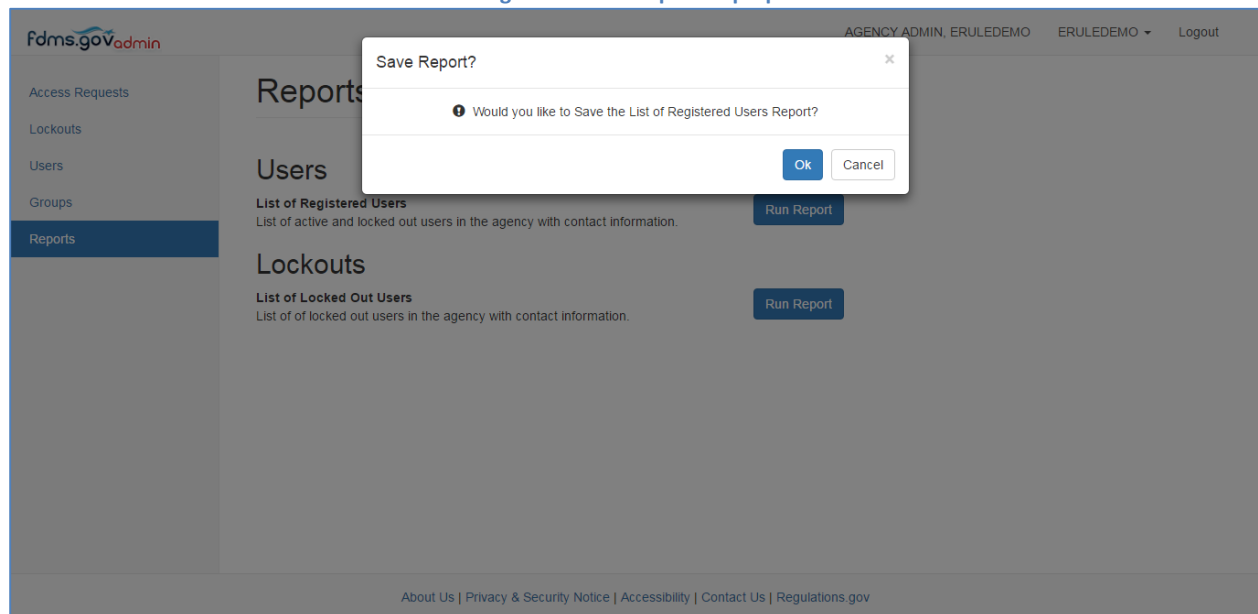
Figure 7 - Reports Screen



The *Run Report* button to the right of each *Report* generates a pop-up asking the user whether they would like to save the *Report*. Choosing *Ok* opens a CSV file which can be saved externally.

The default file name for each report contains the agency acronym, the report that the user selected, and a timestamp for ease of reference.

Figure 8 - Save Report Pop-up



List of Registered Users Report

The *List of Registered Users Report* allows Agency Administrators to export a full list of users within their Agency which includes the contact information for each user, the status of their account, and access statistics. The *Report* provides the Agency Administrator with a CSV file containing the following columns:

- Agency
- User ID
- Last Name
- First Name
- Middle Name
- Email
- Phone Number
- Role
- Account Status
- Last Login
- Password Last Changed

List of Locked Out Users Report

The *List of Locked Out Users Report* allows Agency Administrators to save a list of users within the Agency with a locked *Account Status*. The CSV file contains the same columns as the *List of*

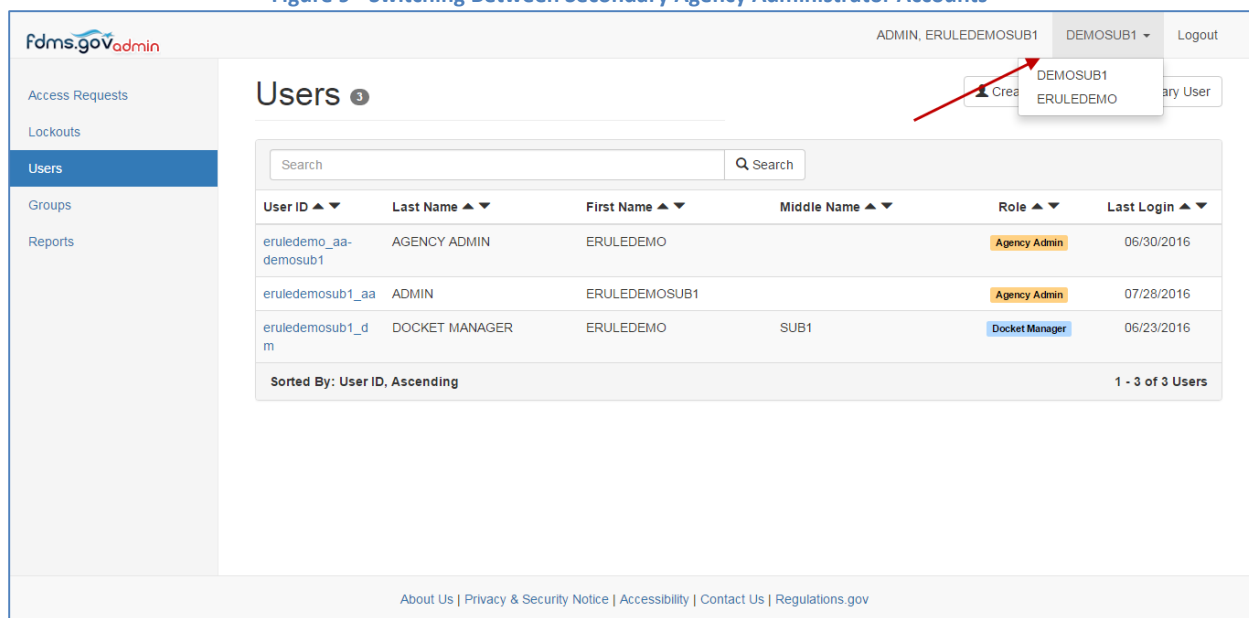
Registered Users Report. The *Account Status* column will only include Locked accounts. *Active* accounts are not included in this report.

Secondary User Accounts

Switching Between Secondary Agency Administrator Accounts

Agency Administrators with one or more *Secondary User Accounts* that are also granted Agency Administrator access can choose which of those agencies they would like to view from a dropdown list in the upper right hand corner of the application.

Figure 9 - Switching Between Secondary Agency Administrator Accounts



The screenshot shows the 'Users' page in the fdms.gov admin interface. The top right corner displays the current user 'ADMIN, ERULEDEMOSUB1' and a dropdown menu to switch between 'DEMOSUB1' and 'ERULEDEMO'. The left sidebar contains navigation links: Access Requests, Lockouts, Users (selected), Groups, and Reports. The main content area shows a table of users with columns for User ID, Last Name, First Name, Middle Name, Role, and Last Login. The table lists three users: eruledemo_aa-demosub1 (Agency Admin), eruledemosub1_aa (Agency Admin), and eruledemosub1_dm (Docket Manager). The table is sorted by User ID, Ascending, and shows 1 - 3 of 3 Users.

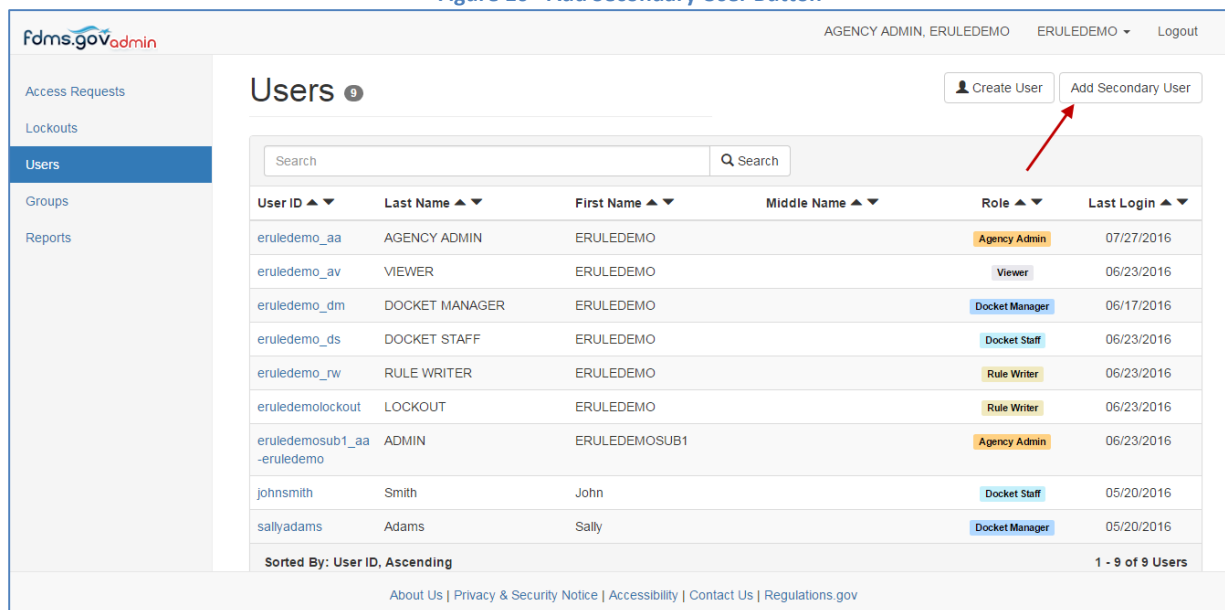
User ID ▲ ▼	Last Name ▲ ▼	First Name ▲ ▼	Middle Name ▲ ▼	Role ▲ ▼	Last Login ▲ ▼
eruledemo_aa-demosub1	AGENCY ADMIN	ERULEDEMO		Agency Admin	06/30/2016
eruledemosub1_aa	ADMIN	ERULEDEMOSUB1		Agency Admin	07/28/2016
eruledemosub1_dm	DOCKET MANAGER	ERULEDEMO	SUB1	Docket Manager	06/23/2016

Sorted By: User ID, Ascending 1 - 3 of 3 Users

Add Secondary User

The *Add Secondary User* button allows Agency Administrators to create a *Secondary User* in their Agency from the list of users in any relevant Sub-Agency. A *Secondary User* can be added with the role of Docket Manager, Rule Writer, Docket Staff or Agency Viewer. In order to add a *Secondary User* with the role of Agency Administrator, please contact the FDMS Help Desk for assistance.

Figure 10 - Add Secondary User Button

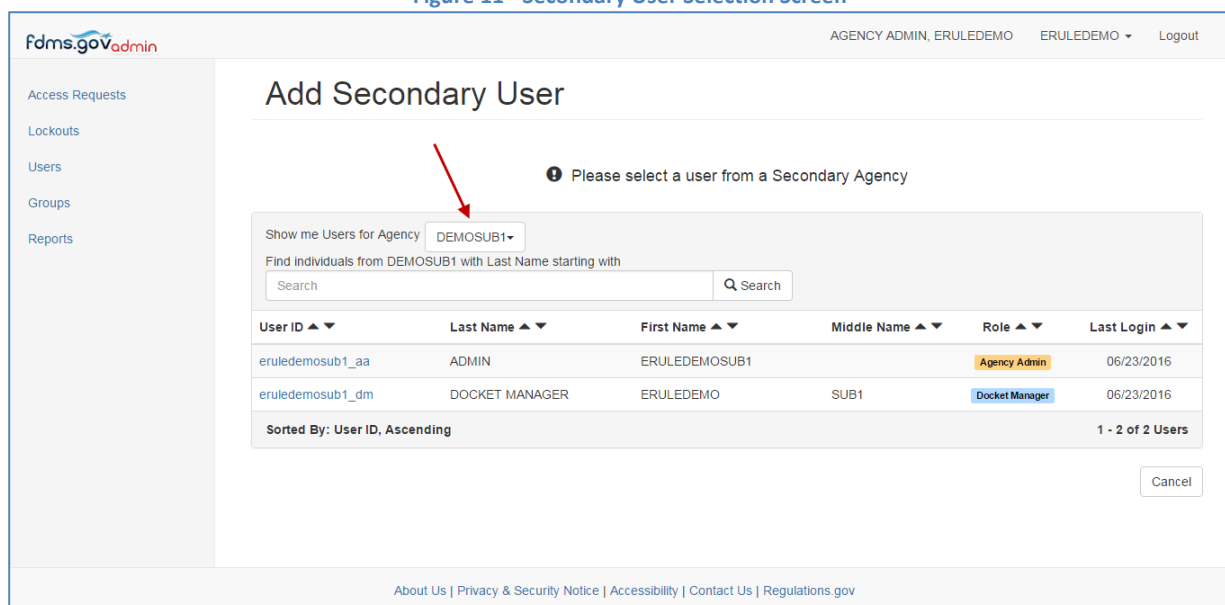


The screenshot shows the 'Users' management page in the FDMS.gov admin interface. The page title is 'Users' with a notification icon. On the right, there are two buttons: 'Create User' and 'Add Secondary User'. A red arrow points to the 'Add Secondary User' button. The main content area contains a search bar and a table of users. The table has columns for User ID, Last Name, First Name, Middle Name, Role, and Last Login. The roles are color-coded: Agency Admin (orange), Viewer (grey), Docket Manager (blue), and Rule Writer (yellow). The table is sorted by User ID, Ascending, and shows 1 - 9 of 9 Users.

User ID	Last Name	First Name	Middle Name	Role	Last Login
eruledemo_aa	AGENCY ADMIN	ERULEDEMO		Agency Admin	07/27/2016
eruledemo_av	VIEWER	ERULEDEMO		Viewer	06/23/2016
eruledemo_dm	DOCKET MANAGER	ERULEDEMO		Docket Manager	06/17/2016
eruledemo_ds	DOCKET STAFF	ERULEDEMO		Docket Staff	06/23/2016
eruledemo_rw	RULE WRITER	ERULEDEMO		Rule Writer	06/23/2016
eruledemolockout	LOCKOUT	ERULEDEMO		Rule Writer	06/23/2016
eruledemosub1_aa-eruledemo	ADMIN	ERULEDEMOSUB1		Agency Admin	06/23/2016
johnsmith	Smith	John		Docket Staff	05/20/2016
sallyadams	Adams	Sally		Docket Manager	05/20/2016

A drop-down with the associated Sub-Agencies is shown along with a list of users from those Sub-Agencies and their primary *User Roles*.

Figure 11 - Secondary User Selection Screen



The screenshot shows the 'Add Secondary User' selection screen. At the top, there is a message: 'Please select a user from a Secondary Agency'. Below this, there is a dropdown menu labeled 'Show me Users for Agency' with 'DEMOSUB1' selected. A red arrow points to this dropdown. Below the dropdown, there is a search bar and a table of users. The table has columns for User ID, Last Name, First Name, Middle Name, Role, and Last Login. The roles are color-coded: Agency Admin (orange) and Docket Manager (blue). The table is sorted by User ID, Ascending, and shows 1 - 2 of 2 Users. A 'Cancel' button is located at the bottom right.

User ID	Last Name	First Name	Middle Name	Role	Last Login
eruledemosub1_aa	ADMIN	ERULEDEMOSUB1		Agency Admin	06/23/2016
eruledemosub1_dm	DOCKET MANAGER	ERULEDEMO	SUB1	Docket Manager	06/23/2016

Clicking on a *User ID* displays the *Add Secondary User* confirmation screen. An Agency Administrator must select the *Access Level* for the *Secondary User*.

Figure 12 - Secondary User Confirmation Screen

fdms.gov admin AGENCY ADMIN, ERULEDEMO ERULEDEMO Logout

Access Requests
Lockouts
Users
Groups
Reports

Add Secondary User

Please confirm that you would like to add the secondary user:
ERULEDEMO SUB1 DOCKET MANAGER **Docket Manager** ERULEMAKING DEMO AGENCY SUB 1

Access Level: ☒ Docket Manager ☐ Docket Staff ☐ Rule Writer ☐ Viewer

Add Secondary User Cancel

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View/Edit Secondary User

After an Agency Administrator adds a *Secondary User*, the *Secondary User* shows in the Agency *Users* list. The *User ID* for a *Secondary User* is the original *User ID* appended with the parent agency acronym.

Figure 13 - Secondary Users in User List

fdms.gov admin AGENCY ADMIN, ERULEDEMO ERULEDEMO Logout

Access Requests
Lockouts
Users
Groups
Reports

Users 10

Create User Add Secondary User

Search Search

User ID ▲ ▼	Last Name ▲ ▼	First Name ▲ ▼	Middle Name ▲ ▼	Role ▲ ▼	Last Login ▲ ▼
eruledemo_aa	AGENCY ADMIN	ERULEDEMO		Agency Admin	07/28/2016
eruledemo_av	VIEWER	ERULEDEMO		Viewer	06/23/2016
eruledemo_dm	DOCKET MANAGER	ERULEDEMO		Docket Manager	06/17/2016
eruledemo_ds	DOCKET STAFF	ERULEDEMO		Docket Staff	06/23/2016
eruledemo_rw	RULE WRITER	ERULEDEMO		Rule Writer	06/23/2016
eruledemolockout	LOCKOUT	ERULEDEMO		Rule Writer	06/23/2016
eruledemosub1_aa-eruledemo	ADMIN	ERULEDEMOSUB1		Agency Admin	06/23/2016
eruledemosub1_d m-eruledemo	DOCKET MANAGER	ERULEDEMO	SUB1	Docket Manager	07/28/2016
johnsmith	Smith	John		Docket Staff	05/20/2016

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Clicking on the *User ID* for the *Secondary User* from the *Users List* displays an *Edit Secondary User* screen where an Agency Administrator can view the *User Information* and change the *Access Level* if desired.

Figure 14 - Edit Secondary User Screen

The screenshot displays the 'Edit Secondary User' interface. At the top, the header includes the 'fdms.gov admin' logo, the user role 'AGENCY ADMIN, ERULEDEMO', the username 'ERULEDEMO', and a 'Logout' link. A left sidebar contains navigation links: 'Access Requests', 'Lockouts', 'Users', 'Groups', and 'Reports'. The main content area is titled 'Edit Secondary User: ERULEDEMO SUB1 DOCKET MANAGER' and includes a legend stating '* Denotes Required Field'. Below the title, there are two main sections: 'User Information' and 'Access Level'. The 'User Information' section contains fields for 'User ID' (eruledemosub1_dm-eruledemo), 'First Name' (ERULEDEMO), 'Middle Name' (SUB1), 'Last Name', 'Title', 'Telephone', and 'Email'. The 'Access Level' section features a radio button selection for 'Access Level' with options: 'Docket Manager' (selected), 'Docket Staff', 'Rule Writer', and 'Viewer'. At the bottom right of the form are 'Save' and 'Cancel' buttons. A footer at the very bottom contains links: 'About Us | Privacy & Security Notice | Accessibility | Contact Us | Regulations.gov'.

fdms.gov admin

AGENCY ADMIN, ERULEDEMO ERULEDEMO Logout

Access Requests
Lockouts
Users
Groups
Reports

Edit Secondary User: ERULEDEMO SUB1 DOCKET MANAGER

* Denotes Required Field

User Information

User ID: eruledemosub1_dm-eruledemo

First Name: ERULEDEMO *

Middle Name: SUB1

Last Name:

Title:

Telephone:

Email:

Access Level

Access Level: ☒ Docket Manager ☐ Docket Staff ☐ Rule Writer ☐ Viewer *

Save Cancel

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Delete Secondary User

Agency Administrators have the ability to delete a *Secondary User* from their Agency by clicking the *Delete* button on the *User Information* page.

Figure 15 - Delete Secondary User Option

The screenshot shows the 'ERULEDEMOSUB2 ADMIN' user information page. The page has a sidebar with links: Access Requests, Lockouts, Users, Groups, and Reports. The main content area is titled 'ERULEDEMOSUB2 ADMIN' and includes a 'Docket Manager' button. There are three main sections: 'User Information', 'Supervisory Point of Contact Information', and 'User Statistics'. The 'User Information' section contains fields for User ID, Full Name, Email, Phone, and Other. The 'Supervisory Point of Contact Information' section contains fields for Full Name, Title, Email, Phone, and Ext. The 'User Statistics' section contains fields for Created Date, Last Login, and Password Expires. A red arrow points to the 'Delete' button in the top right corner. Below these sections is a 'Groups' section with a filter input and a table with columns: Group Name, Comments, and Remove. The table currently shows 'No values to display'. At the bottom of the page are links: About Us, Privacy & Security Notice, Accessibility, Contact Us, and Regulations.gov.

User Information	
User ID:	eruledemosub2_aa-eruledemo
Full Name:	ERULEDEMOSUB2 ADMIN
Email:	oliva_amanda@bah.com
Phone:	000-000-0000
Other:	

Supervisory Point of Contact Information	
Full Name:	
Title:	
Email:	
Phone:	
Ext:	

User Statistics	
Created Date:	
Last Login:	07/28/2016
Password Expires:	

Group Name	Comments	Remove
No values to display		

Similar to any Agency account deletion, the Agency Administrator must select another user to replace the assignments for the user they wish to delete.

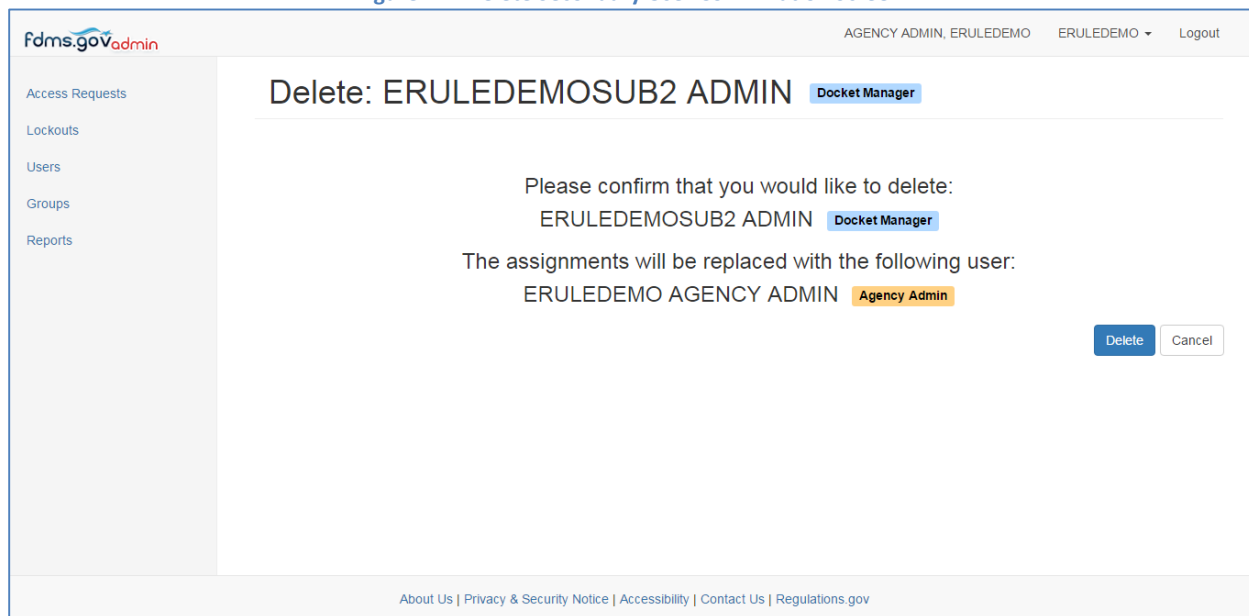
Figure 16 - Delete Secondary User Reassignment Screen

The screenshot shows the 'Delete: ERULEDEMOSUB2 ADMIN' reassignment screen. The page has a sidebar with links: Access Requests, Lockouts, Users, Groups, and Reports. The main content area is titled 'Delete: ERULEDEMOSUB2 ADMIN' and includes a 'Docket Manager' button. A message states: 'Please select a user to replace the assignments for 'ERULEDEMOSUB2 ADMIN''. Below this is a search bar with the text 'Find individuals from My Agency with Last Name starting with' and a 'Search' button. A table lists available users with columns: User ID, Last Name, First Name, Middle Name, Role, and Last Login. The table contains 8 rows of user information. At the bottom of the page are links: About Us, Privacy & Security Notice, Accessibility, Contact Us, and Regulations.gov.

User ID	Last Name	First Name	Middle Name	Role	Last Login
eruledemo_aa	AGENCY ADMIN	ERULEDEMO		Agency Admin	07/28/2016
eruledemo_av	VIEWER	ERULEDEMO		Viewer	06/23/2016
eruledemo_dm	DOCKET MANAGER	ERULEDEMO		Docket Manager	06/17/2016
eruledemo_ds	DOCKET STAFF	ERULEDEMO		Docket Staff	06/23/2016
eruledemo_rw	RULE WRITER	ERULEDEMO		Rule Writer	06/23/2016
eruledemolockout	LOCKOUT	ERULEDEMO		Rule Writer	06/23/2016
eruledemosub1_aa-eruledemo	ADMIN	ERULEDEMOSUB1		Agency Admin	06/23/2016

The deletion confirmation screen provides the Agency Administrator with a summary of the requested deletion and reassignment actions. Clicking the *Delete* button will delete the *Secondary User* account, however, the user's primary account will remain. In order to remove a user from the system completely, an Agency Administrator in that user's primary Agency must delete the primary account.

Figure 17 - Delete Secondary User Confirmation Screen

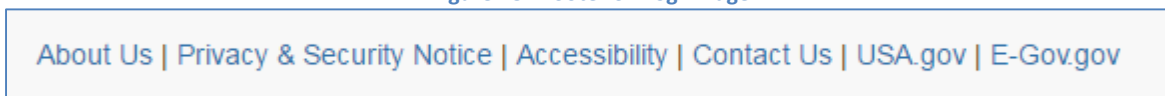


Footer

Login Page

The footer on the login page contains the same footer items that are accessible from the login page of FDMS 4.

Figure 18 - Footer on Login Page



After Authentication

The footer after a user is logged into the system provides a subset of the footer links available after login in FDMS 4. The footer in FDMS 4 contains the following additional items that will be implemented in a future release of the Admin Module: FAQs, Glossary, Resource Center and Training.

Figure 19 - Footer after Authentication

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Known Issues

There are no Known Issues to report as a result of this release.